Supplemental Authorization Request (SAR)
Agenda

• What is a SAR?
• When should a SAR be used?
• When should a SAR not be used?
• New electronic SAR process
• Routing steps
What is a SAR?

The Supplemental Authorization Request (SAR) process is used when requesting payment to full time faculty or staff for additional duties performed outside their full time job function.

Request should be submitted and approved prior to start date of additional duties.
When Should a SAR Be Used?

Instructional
- Overload Instruction
- Developing on-line course
- Staff teaching a course

Overload payments for instruction need to be paid from a faculty appointment

Sponsored Research
- Mostly for intra-university consultation where payee is:
  - From across departmental lines
  - Work is outside normal duties
  - Payment is proportioned to the employee’s annual rate
When Should a SAR Not Be Used?

• Awards
  • Ex: UT System awards
    • Processed by back offices

• Additional Staff Related Duties
  • Ex: Staff taking on additional responsibilities in absence of Director
    • Processed via HRAC venue

• Minimesters
  • Maymester or wintermester
    • Continue sending spreadsheets to CAO

• Grants
  • Ex: Budgeted effort, incentives
    • See policy
ELECTRONIC SAR FORM
HOW TO COMPLETE AND ROUTE
Employee requesting additional pay

Employee’s supervisor
SAR – Current Section

<table>
<thead>
<tr>
<th>Position Number</th>
<th>10020557</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Title</td>
<td>Professor</td>
</tr>
<tr>
<td>Job Code</td>
<td>10010</td>
</tr>
<tr>
<td>College / Division</td>
<td>College of Science</td>
</tr>
<tr>
<td></td>
<td>Kirken, Robert</td>
</tr>
</tbody>
</table>

Drop down of all active appointments associated w/employee

<table>
<thead>
<tr>
<th>Position Number</th>
<th>10020556</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Title</td>
<td>Professor</td>
</tr>
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<td>Job Code</td>
<td>10010</td>
</tr>
<tr>
<td>College / Division</td>
<td>College of Education</td>
</tr>
<tr>
<td></td>
<td>Giorgis, Cyndi</td>
</tr>
</tbody>
</table>

Employee must be appointed 100%
SAR – Current Section

Courses currently being taught?  ● Yes  ○ No

<table>
<thead>
<tr>
<th>Dept / Course#</th>
<th>CRN</th>
<th>Start Date</th>
<th>End Date</th>
<th># Students Enrolled</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCT 100</td>
<td>1301</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Dates should match semester |

<table>
<thead>
<tr>
<th>1. Fall</th>
<th>2. Spring</th>
<th>3. Summer</th>
<th>4. Academic Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall: 9/1 – 1/15</td>
<td>Spring: 1/16 – 5/31</td>
<td>Summer: 6/1 – 8/31</td>
<td>Academic Year: 9/1 – 5/31</td>
</tr>
</tbody>
</table>

Research Activities Involvement  ● Yes  ○ No

<table>
<thead>
<tr>
<th>Project Number</th>
<th>Role</th>
<th>Description of research being performed</th>
</tr>
</thead>
</table>

| PI  |
| CO-PI  |

Key Personnel

Notes

Description of administrative, service or other activities currently involved in
### SAR – Requested Section

1. Instructional
2. Grants

If position is not active, set current position and add comments on position number that should be used to processing the SAR.
### SAR – Requested Section: Instructional Activity

<table>
<thead>
<tr>
<th>Dept / Course#</th>
<th>Start Date</th>
<th>End Date</th>
<th># Students Enrolled</th>
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</thead>
<tbody>
<tr>
<td>ACCT 1301</td>
<td></td>
<td></td>
<td></td>
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</table>

- **Fall**: 9/1 – 1/15
- **Spring**: 1/16 – 5/31
- **Summer**: 6/1 – 8/31
- **Academic Year**: 9/1 – 5/31

- **Total payment amount will be distributed in monthly payments based on the period of service.**
Total payment amount will be distributed in monthly payments based on the period of service.
**SAR – Requested Section: Funding Source**

<table>
<thead>
<tr>
<th>Cost Center / Project ID Approver</th>
<th>Funding Begin Date</th>
<th>Funding End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gomez, Guadalupe</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Distribution Percentage</th>
<th>30</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Title</th>
<th>Project Begin Date</th>
<th>Project End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOBACCO RESEARCH EXPENDITURES</td>
<td>8/1/2009</td>
<td>8/31/2020</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Cost Center / Project ID Approver</th>
<th>Funding Begin Date</th>
<th>Funding End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roth, Timothy</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Distribution Percentage</th>
<th>70</th>
</tr>
</thead>
</table>

- **Begin/end dates must be within activity dates.**
- If funding from multiple sources, distribution percentage must equal 100
SAR – Routing: Instructional
Approver Responsibility - Instructional

**Employee**
- Acknowledge terms of additional duties, verify activity and total payout amount.

**Reports To**
- Confirm additional duties do not conflict with current assignment.

**Dean**
- Ensure equity across the college and that faculty member has sufficient time to take on additional duties in relation to other commitments, like research and college service duties.

**Provost**
- Review frequency of payments and confirm supplemental payment is warranted.

**CAO**
- Verify course is taught by individual seeking additional pay; confirm total payout amount, funding source/availability and position to be paid from.

**Budget Authority**
- Verify funding source/availability, payee compensation, and total payout amount.
Approver Responsibility – Grants

Employee
  – Acknowledge terms of additional duties, verify activity and total payout amount.

Reports To
  – FYI notification only.

Budget Authority/PI
  – Verify funding source/availability, payee compensation, and total payout amount.
Employee Acknowledgement

**Instructional:**
I, **employee name**, acknowledge that by approving this agreement, I verify that performing the additional duties requires efforts beyond my regular scope of responsibilities and thus am eligible for supplemental pay.

**Grants:** I, **employee name**, acknowledge that by approving this agreement I’m responsible to fulfill and complete all objectives in a timely fashion for which I am receiving this supplemental payment. If I’m engaged over several months, I understand that I will receive equal monthly distribution of the negotiated supplement with my payroll. The objectives and performance period are detailed in the Supplement Authorization Request (SAR) form. Should I fail to meet all objectives as negotiated, I understand that the PI has the authority to reduce, terminate payment, or even request reimbursement of prior payments. I further understand that I can’t begin work until the SAR is approved by ORSP and other authorizing officials.
Approver Responsibility – Back Offices

Grants
- Verify allowability of activity can be billed to the grant.

Budget
- Verify sufficient funds exist.

President
- Review/approve request.

HRTC
- Review position used for supplement and if needed, activate.
- Review job function and confirm employee is currently appointed 100%.

Payroll
- Verify earn code, end date, and process payment.

Regardless if instructional or grants, all SAR disbursements are made through Payroll.
Where can Form be Found?

Form Location

– Forms Mine/Payroll
– PeopleSoft Resources

Presentation

– PeopleSoft Training Documents

Form will be available starting Monday, May 1
Other Things to Know

• SAR payments are processed with the monthly paychecks. Off-cycles should not be requested.

• If payment needs to be stopped, email payroll@utep.edu and include DTN and name of employee.

• If the SAR is denied, only the initiator is notified. Notify your CAO to determine next steps.
Thank you

For additional questions regarding the SAR process, contact your College Administrative Officer.